

PRACTICAL ESTATE PLANNING IN UNCERTAIN TIMES



Live Webinar | Friday, September 25, 2020

AGENDA

9:00 AM - 10:40 AM

Shining Light Through the Darkness: Planning in the Shadow of Uncertainty, Social Distancing, and Fear
Paul Lee, Northern Trust, New York, NY

10:40 AM - 11:30 AM

Planning with Retirement Plans Under the CARES and SECURE Acts
David E. Bowers, Jones Foster, P.A., West Palm Beach

11:30 AM - 12:00 PM

Break

12:00 PM - 12:50 PM

Don't Panic! Things to Look Out for at the Intersection of Business Entities and Estate Planning
Cristin C. Keane, Carlton Fields, Tampa

12:50 PM - 1:40 PM

Creative Uses for Grantor and Non-Grantor Trusts
Austin Bramwell, Milbank, New York, NY

1:40 PM - 1:50 PM

Break

1:50 PM - 2:40 PM

What Every Attorney and CPA Needs to Know to Prepare and Review Estate and Gift Tax Returns
Mark Scott, Kaufman Rossin, Miami

2:40 PM - 3:30 PM

20 Tax Traps Related to Trustee Selection
Mark Parthemer, Bessemer Trust, Palm Beach

3:30 PM - 4:20 PM

Planning in Light of the Current Political Environment
Lester B. Law, Franklin Karibjanian & Law PLLC, Naples

General CLE

8.0 hours

Cert Credit

8.0 hours

Elder Law

Tax Law

Wills, Trusts, Estates

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